

# Quick Reference Guide - 3M eSettlements

## 3M US Legacy Purchase Orders (10-digit, Alpha-Numeric, Beginning USMMM)

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### Purchase Orders

User Guide - 3M US Legacy POs - eSettlements - Pages 3-5 Manage Orders - Purchase Orders

- Click the Manage Orders link
- Click the Purchase Orders link
- Enter criteria - Filter Options
- Click search

### Acknowledge Purchase Orders

User Guide - 3M US Legacy POs - eSettlements - Pages 6-9 Manage Orders - Acknowledge Purchase Orders

- Click the Manage Orders > Acknowledge Purchase Orders
- Enter criteria - Filter Options
- Select one of the radio-button options
  - View Current Acknowledgements - New/Supplier Review
    - No POAs have been submitted
  - View Current Acknowledgements - Supplier Respond/Buyer Accept
    - POA has been submitted and Buyer accepted
- Click search
- Click on the Purchase Order link to view the Acknowledgement Summary page.
- Click the Line link to review and modify details of the line, such as quantity, price, and due date.
- Click on More Item Details to make any changes
  - If no changes are required, click the Return button
  - Due Date & Quantity tab
    - Change quantity in Quantity field
    - Click on the calendar to the right of the Due Date field to change due date
  - Price tab
    - Click in price field to modify unit price
  - Click Return button when completed
- Click Save & Send Acknowledgement button
  - No changes made
    - Sets acknowledgement status to Buyer Accepted
  - Changes entered
    - Saves changes
    - Sets acknowledgement status to Supplier Responded
    - Notification is sent to the 3M Buyer indicating a POA needs to be reviewed
- At the Save Confirmation, click the OK button to return to the Search/Filter Acknowledgement page

### View Order Summary

User Guide - 3M US Legacy POs - eSettlements - Page 10 Manage Orders - View Order Summary

- Click the Manage Orders link
- Click the View Order Summary link
- Enter criteria - Filter Options
- Click search

**NOTE: The "Include PO Data" box MUST be checked for data to appear.**

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### Review Payment Information - Invoices

User Guide - 3M US Legacy POs - eSettlements - Pages 12-14 Review Payment Information - Invoices

- Click the Review Payment Information link
- Click the Invoices link
- Enter criteria - Filter Options
- Click search

Invoice List page shows general invoice information.

Select a specific invoice for more details, such as the payment status

#### Invoice Details

- Approval Status
  - Matching Exception - Price, quantity, or amount of invoice does not match the PO  
Contact the 3M Buyer for assistance
  - Approved for Payment - Invoice is ready to be paid on the due date
  - Denied - Invoice did not match or could not match against the PO  
Contact the 3M Buyer for assistance
  - Pending - Invoice has not yet gone through batch processes to match against the PO.  
If the invoice status remains pending for more than 72 hours, contact the 3M Buyer
- Payment Status
  - To be paid - Invoice is ready to be paid on the due date
  - Paid in full - Invoice has been paid
  - Approved for payment - Invoice is ready to be paid on the due date

### Contact 3M

- Issues with pricing/quantity/unit of measure when POA has not resulted in the correction needed, or concerns with invoice not accepted by 3M within payment terms: 3M Buyer listed on the PO.
- Registration and technical eSettlements issues: Connect with [3M Supplier eCommerce Support](#).
- Banking or payment type changes are handled by Western Union (Convera): Log into [your account](#).  
If you do not have an account, please call 800-815-2460 or email [Vendormanagement@Convera.com](mailto:Vendormanagement@Convera.com).
- Changes in Company profile information: Merger/divestiture/name change: 3M Buyer listed on the PO.

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#### eSettlements - Self-Service Invoice - Create Invoice

Instructions - 3M-issued POs - eSettlements - Pages 18-21 Self-Service Invoice - Create Invoices

- Click the Create Invoice link
- Buyer - Choose 3M Company (POs beginning USMMM) or 3M Health Information Services (POs beginning with HQMMM)
- Location, Currency, Requester - Do not modify!
- Invoice ID - Supplier's invoice number - The invoice number can contain alpha and numeric characters, but it **cannot** contain lowercase letters, leading zeros, dashes, slashes, spaces, periods, or other special characters. Alpha characters MUST be entered in all CAPS (Caps Lock on).
- Invoice Date - Defaults with current date. Adjust to the correct invoice date.
- Click on Copy from a Purchase Order button
- Enter the PO Number. *Business Rule - Only one PO can be referenced on an invoice.*
- Click Search
- Select the Lines to invoice against by putting a checkmark in the checkbox.  
*IF A LINE HAS BEEN CANCELED, you must make sure the checkbox is empty, so it is not copied to the invoice.*
  - If you need to bill for an item which is not on the PO, you must first submit a PO acknowledgement.
- Click on the Copy To Invoice button.
- Invoice Lines tab - Verify the information copied from the PO is correct
  - Quantity adjustments may be needed for POs which will be invoiced multiple times  
Price adjustments will require a Purchase Order Acknowledgement before the invoice is created.
  - Do not change the Item ID, Description, or UOM (Unit of Measure)  
If any of these are incorrect, contact the 3M Buyer to verify the 3M purchase order number.
  - Do not modify the value in the Total Amount. Click on the refresh icon to the right of the field.
  - If the PO is taxable, the Tax? checkbox will be checked on each line.
- PO Details tab - If there are multiple schedules/shipments, remove the ones not being billed on the invoice.
- Total Amount - Do not modify! - Click the refresh icon to the right of the line.
- Shipping Amount - Freight charges cannot be a separate invoice. If freight charges are not known, click the Save for Later button and view the invoice when ready to add the shipping amount.
- If a miscellaneous charge needs to be added, click on the miscellaneous charge icon to the right of the Misc Charge Amount field.
  - Enter the Miscellaneous Charge Code (or search for it)
  - Enter the dollar value of the miscellaneous charge  
- This should NOT include tax or freight.
  - *Business Rule - The same Miscellaneous Charge code cannot repeat on a single invoice*
  - Click OK button when finished
- Click on the refresh icon to the right of Total Amount to ensure the amounts being billed equal the Gross Amount.
- If everything is correct, click the Save and Submit button.
  - Once you submit the invoice, you cannot make changes.
  - NOTE: Using the Save for Later button will NOT submit the invoice to 3M. 3M has no visibility to invoices which have not been submitted to 3M.